Acquisition Planning and Execution (APEX) System
Version 1.1
User Training Manual

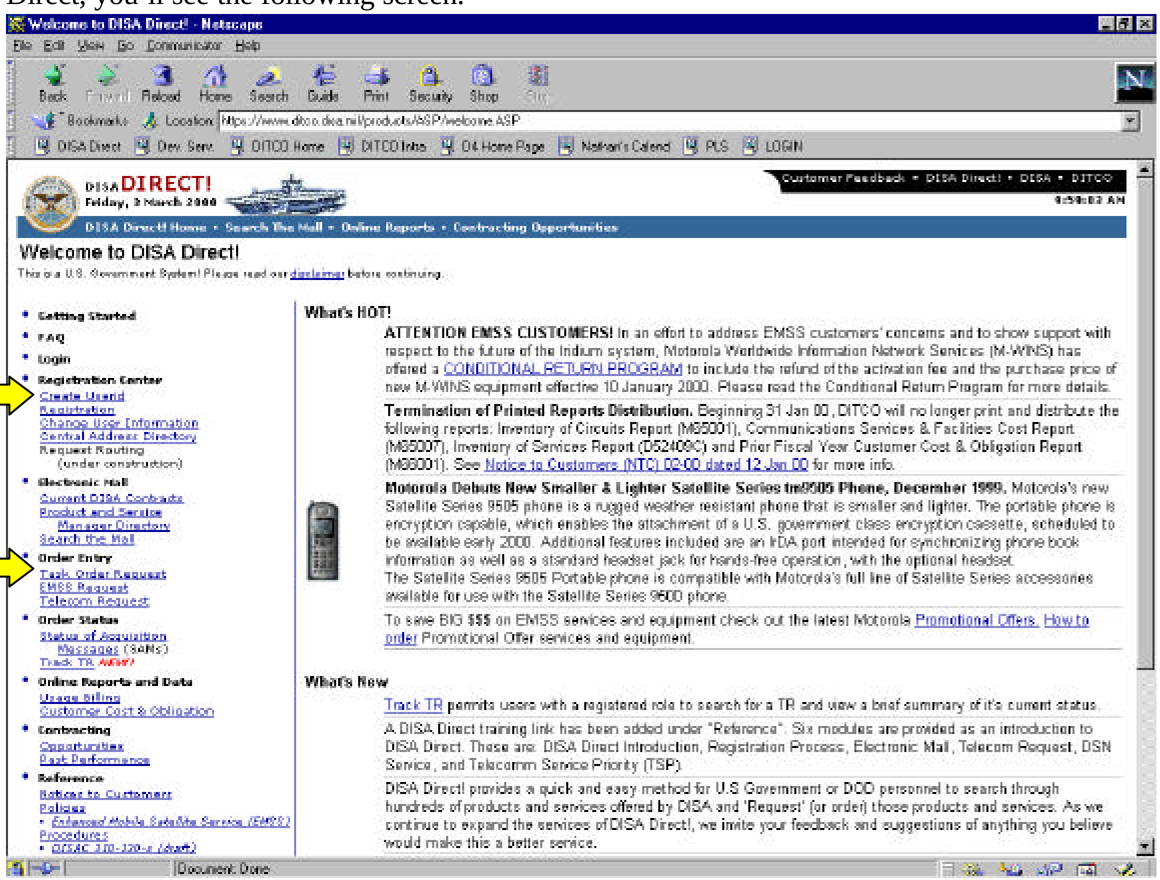
Introduction

The Acquisition Planning & Execution (APEX) system will allow users of DISA's large technical services contracts ('I-Assure', DEIS II, ITSC, DSSG, JSE, DII IC, and DII COE) to plan and prepare the requirements package necessary to award a task order. The principal distinction between the current process and using APEX is that users will be able to enter a single application (a web browser) and access all the forms necessary to develop a requirements package. Since the application is browser based, users from all over the world can prepare their packages the same way internal users do without worrying about forms accessibility, proper formatting, or versioning of software. In addition, by integrating the documents within the requirements package, users will only have to enter repetitive data once and the tool will automatically populate the fields on all the applicable forms where that data is required.

Although future releases of APEX will provide the ability to electronically route the requirements package, search for data within the package, assist the customer in scoring contractors' proposals, and more, the purpose of the initial release is to allow customers to develop, save and/or print a complete requirements package using a web browser (either Netscape or Internet Explorer).

Logging On

To access APEX you need to create a user ID and password. Do this from the DISA Direct Homepage (https://www.ditco.disa.mil/products/ASP/welcome.ASP). Once you're in DISA Direct, you'll see the following screen.

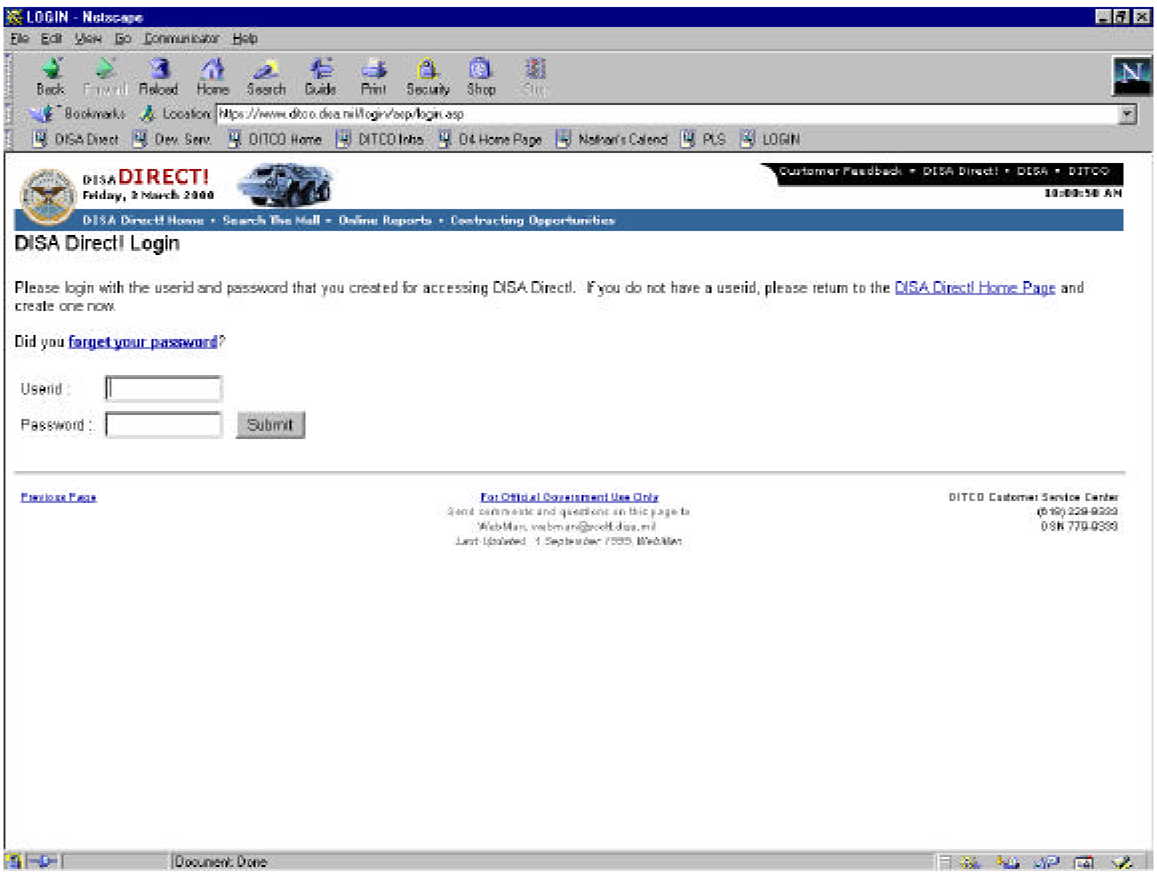


If this is the first time you’ve tried to log on to APEX, you must first register in DISA Direct. During this process you’ll also create a UserID and password which you’ll use to access APEX directly in the future.

To register, click on the ‘Create UserID’ link under ‘Registration Center’ in the left menu bar (see top arrow in screen above). Fill in the information that each screen requests. Once you’ve completed the ‘Create UserID’ process, you can use the UserID and password which you’ve created to directly access APEX.

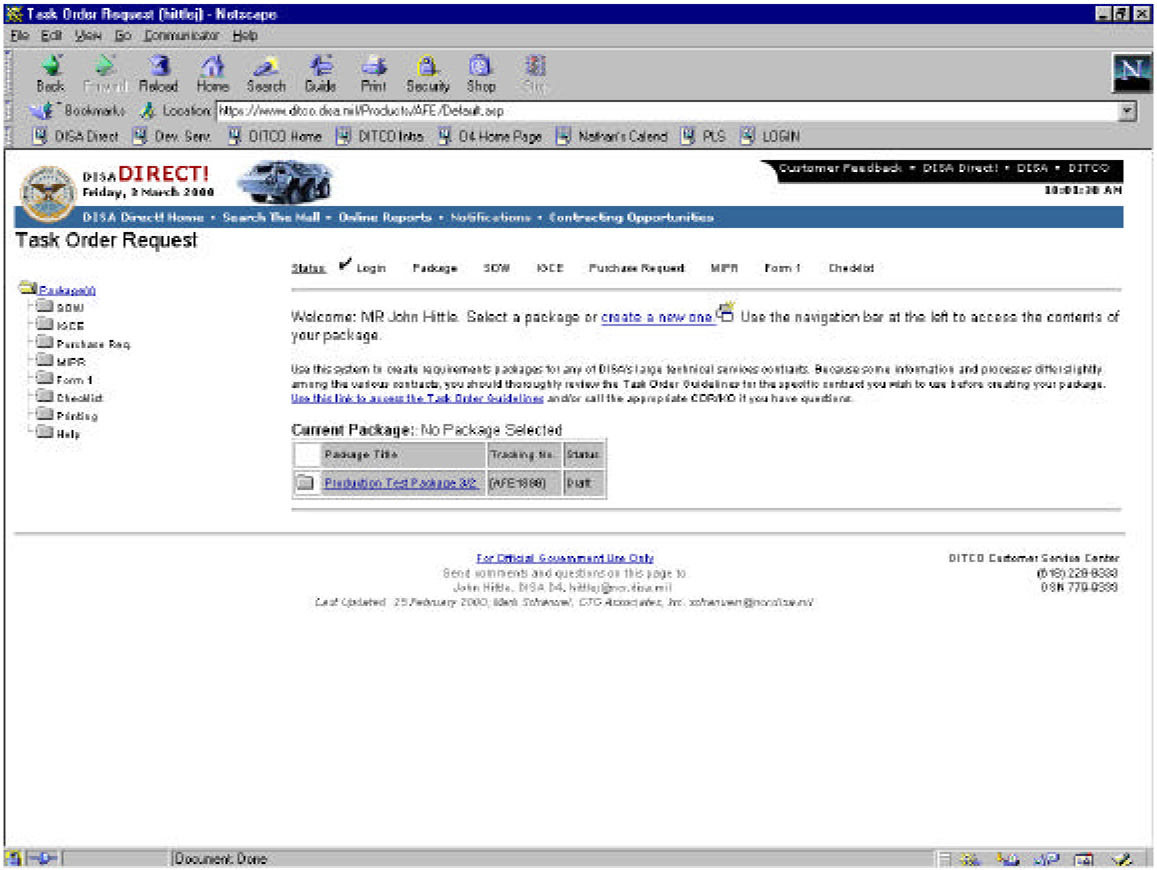
To access APEX, bring up the DISA Direct Homepage again and click on ‘Task Order Request’ under the heading ‘Order Entry’ (see bottom arrow on above screen).

You should now see the following screen:



Enter the UserID and password that you created during the registration process and press SUBMIT.

You are now in the APEX system and you should see the following screen:



Creating a Requirements Package

This is the APEX splash page. If this is the first time you've logged into APEX, you'll notice that below the welcome remark there isn't a table as shown above. The table lists all the requirements packages you've created using APEX so the first time you log in, there won't be a table. After you've initiated or completed a requirements package using APEX, your package/s will be displayed in a table every time you log in with your account. If you want to access one of these packages, simply click on the name of the package to activate it.

If you're creating a requirements package for the first time, or wish to create a new package, click on the 'create a new one' link above the table.

Once you've decided to either create a new requirements package or complete an in-process one by clicking on the applicable link, you'll notice that the folder icons on the left menu bar activate by turning yellow. You can now select any of the documents listed in the menu bar and begin filling out the information required for your package. Because some data is duplicated among the different forms, you are encouraged to select the documents as they are listed (top to bottom). As you complete information in the SOW or IGCE, for example, the system will auto-populate fields in the other forms (e.g. PR and Form 1) that require the same data. For example, when you complete your IGCE, the system will automatically insert the calculated total in the appropriate blocks of the funding document and the Form 1.

In addition, as you begin preparing each of the documents in your requirements package, whenever you exit that document, the tool will place a checkmark next to the document type that you've exited. This 'state' information is useful when you don't have time to complete a requirements package and have to quit the application and start at a later time. When you enter the system again, you have a quick reference to let you know which documents you've worked on and which ones you still need to.

Note: The system will automatically time out after 20 minutes of inactivity. If you try to click on a link and the system provides an error message, chances are you have been timed-out. Simply refresh the main screen and try again. In some cases, you may need to log back in again using your username and password or even close and reopen your browser.

Let's create a new Statement of Work.

Statement of Work (SOW)

When you select the SOW link, a secondary window will pop up and ask you to enter a title for your requirements package and to specify the contract you wish to use from a pick list of available contracts. Note, that even if you are preparing a requirements package against a "FASA" contract and are going through the 'fair opportunity' process, there are appropriate selections in the pick list. For example, if you're competing your effort among the JSE contractors, pick the selection titled 'JSE TBD: DCA100-97-D-002x'. Once you've submitted your selection, the system will assign your requirements package a tracking number and will open the following screen. This screen provides the outline of the SOW. Each section of the SOW is a link for you to click on to complete. The format for the SOW is a standard format as agreed to all the Contracting Officers of the available contracts.

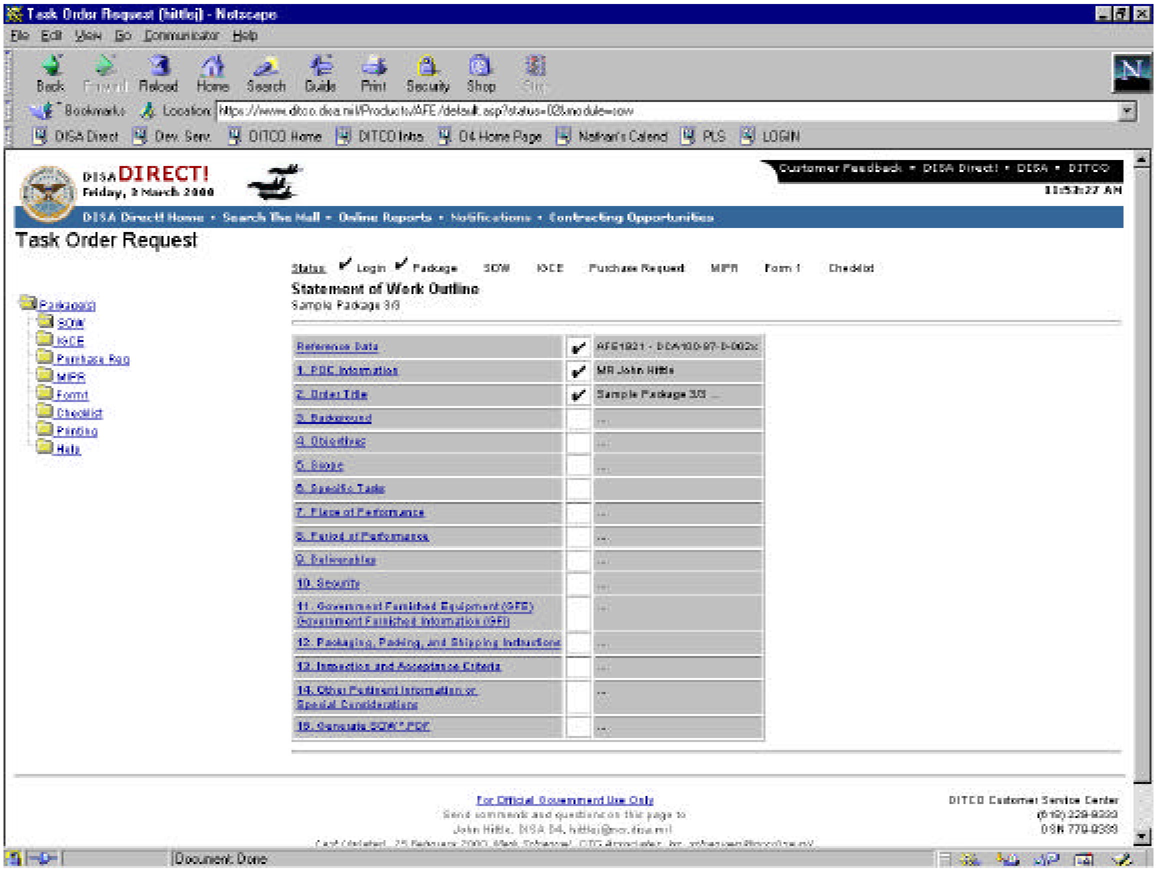
As you open and close each section of the SOW, the screen will refresh and a checkmark will be placed beside each of the SOW sections, which you've worked on. Also, the table will display the first few words of each section for which you've entered data.

There are two ways to work through the SOW sections. On each screen you'll find two buttons at the bottom of the page. One says, "Save and Close" and another says, "Save and Next". Clicking on "Save and Close" will save your data, close the section, and return you to the SOW screen below. Each time you click "Save and Close" the state information will be updated and checkmarks will appear next to the sections you've completed.

A faster way to get through the SOW sections is to click the "Save and Next" button. This command will save all the data you've entered, close the screen you were working in, and immediately open the next section of the SOW for you to complete. Clicking "Save and Next" does not refresh the screen and update the state information until you've completed all the sections of the SOW.

Most of the sections are self explanatory, however, a few sections contain capabilities that require some familiarization so let's go through each of them:

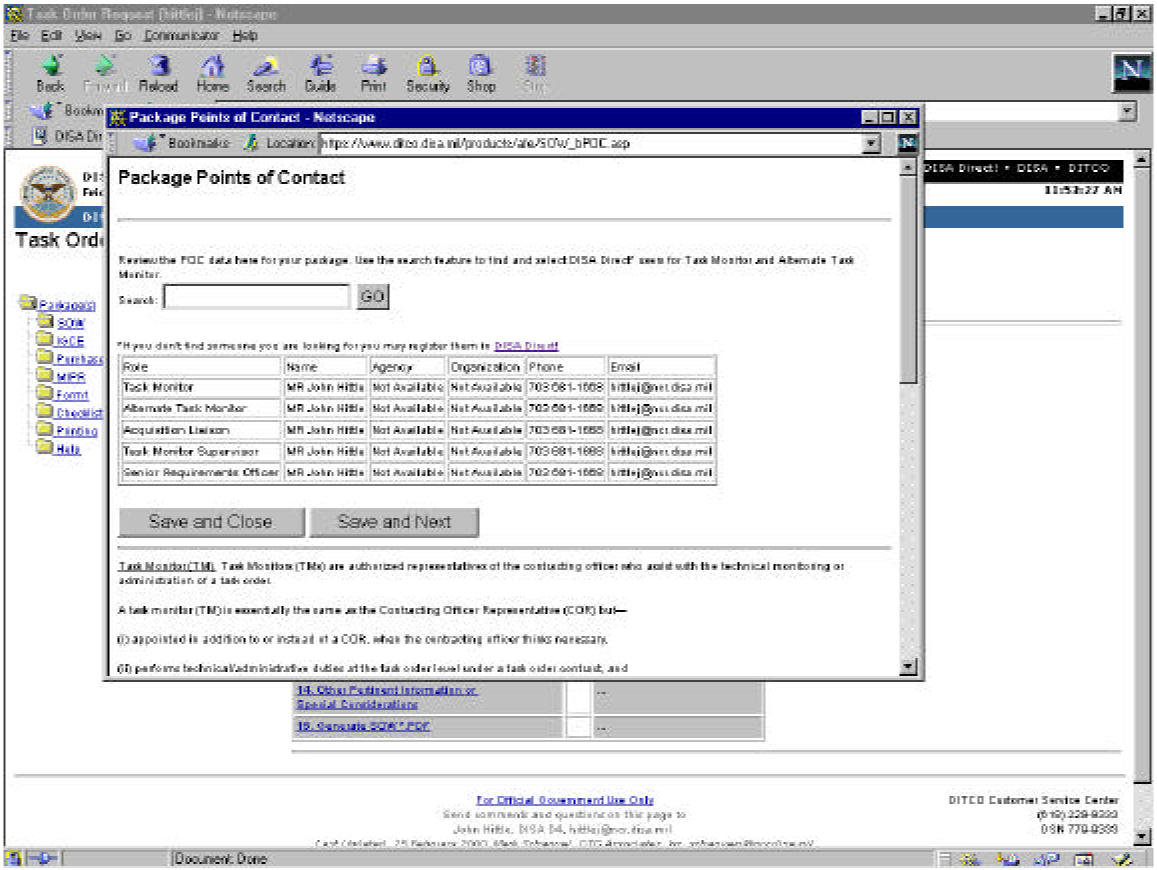
Reference Data: This section is autopopulated and therefore you do not need to open it. It is simply a place where the tracking number and contract number are stored.



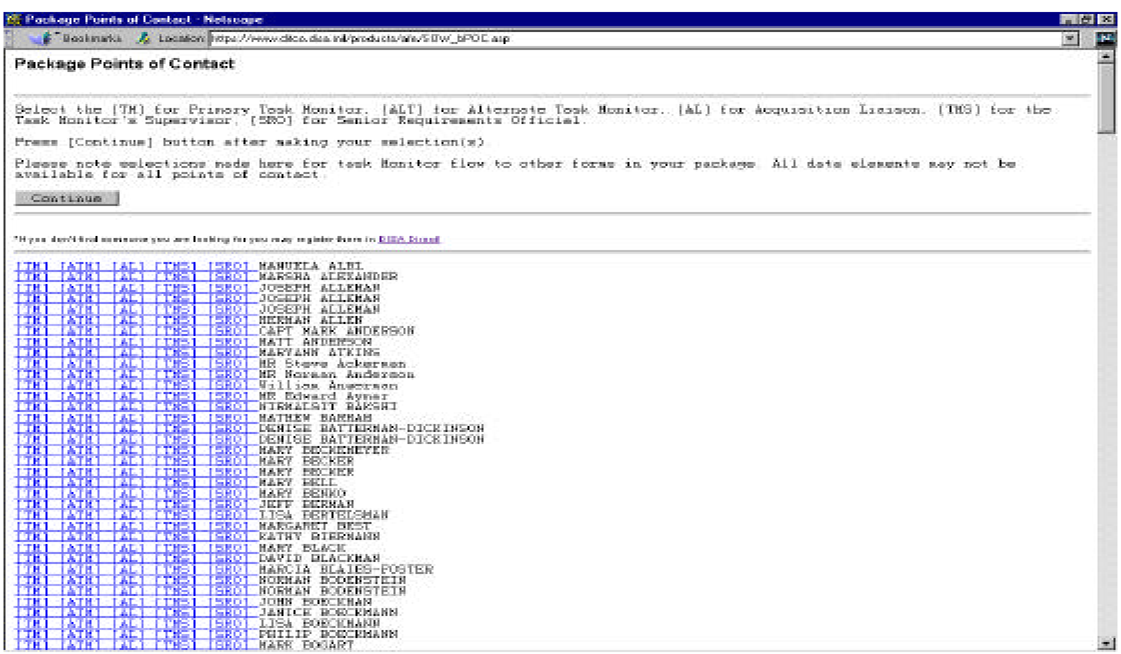
Section 1: POC Information: Click on this section to specify who the points of contact will be for your task order. You must specify a Task Monitor (TM), an Alternate Task Monitor (ATM), an Acquisition Liaison (AL), the Task Monitor's Supervisor (TMS), and the Senior Requirements Official (SRO). Definitions of each of these roles are provided at the bottom of the screen.

The system automatically populates each role with your name initially. To change the points of contact, type a name or part of a name in the search box and press "Go". The system will bring up a list of people who have registered in DISA Direct from which you can pick from. If the name of the person you are looking for does not appear, chances are its because that person has not registered in DISA Direct. Either you or they will need to register their information in DISA Direct before they can be assigned as a point of contact on the task. Registration is a one-time procedure. After a person is initially registered in DISA Direct, they should never have to re-register.

Note: All points of contact for a requirements package must be registered in DISA Direct.



Let's assume you've searched on the letters "ma", your screen will contain the names of all people with "ma" in their name. Next to each name will be an acronym for each of the roles described above. Simply click on the role next to the name of the person whom you'd like to assign. A pop-up window will appear asking you to confirm your selection.



You can now select additional people from this list, if applicable, or you can click on "Continue" and enter someone else's name to select as another point of contact. Do this until you've assigned a person to each role.

When you've assigned someone to each role, you can click on "Save and Close" or "Save and Next" to continue (*see page 4 for the differences between the two*).

Section 2: Order Title. The system automatically populates the title section of the SOW with the title you entered when you first opened the SOW link. You may click on this section and retype the title if you wish to change it. To continue, click "Save and Next".

Section 3: Background. Simply type whatever background information applies to your task in the text box. There is no limit to the amount of text you can type. If you like, you can copy and paste information from a Word document into the text box. When you're finished, click "Save and Next".

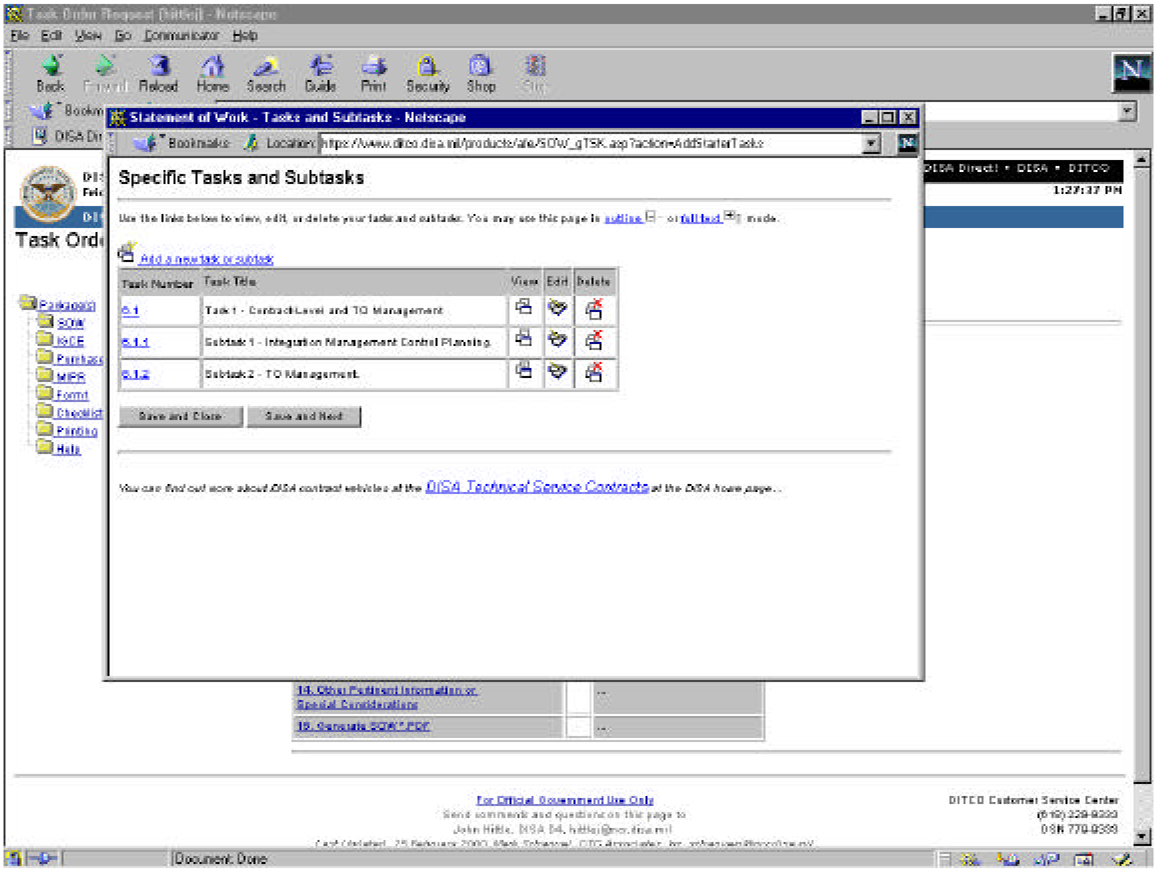
Section 4: Objectives. As with the previous section, simply type in the applicable text in the text box provided. Cut and paste information from another source if you'd like. When you're finished, click "Save and Next".

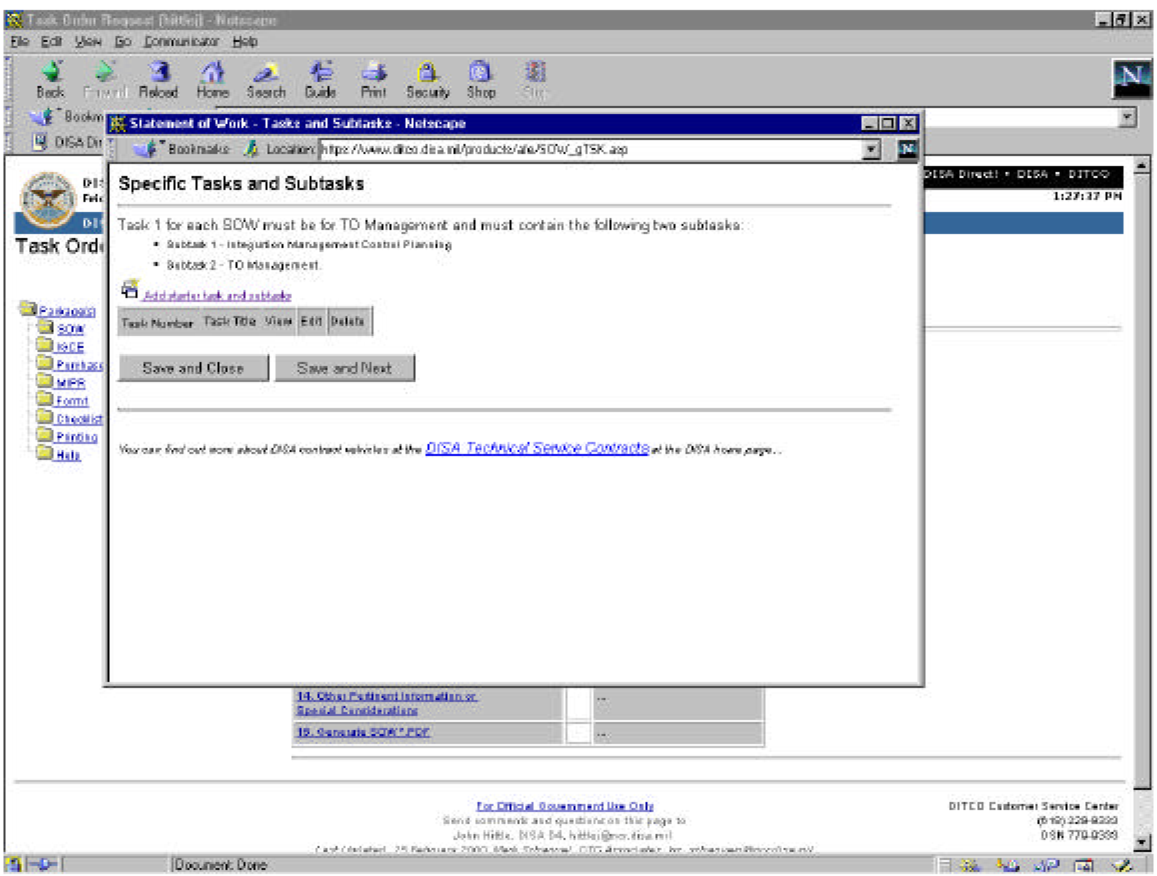
Section 5: Scope. When this window is opened it lists the task areas of the contract which you initially chose when beginning your package. Simply click the box next to each of the task areas that apply to your requirements package. You may also provide additional clarification of the nature of the work to be done under each of the task areas in the text box provided. When you are finished, click "Save and Next".

Section 6: Specific Tasks. When you open this screen, you'll see the page below. Because most task orders should contain tasks for Contract level and Task Order Management, we've pre-populated these tasks in Section 6. To view them and begin adding other tasks, click on "Add Starter Tasks and Subtasks". The verbiage provided in these tasks are acceptable as written most of the time, however, if you wish to edit any of the information, you can either click on the number of the task to open it, or click on the edit box next to the task which you'd like to change.

You may also view the entire textual content of the tasks by clicking the link "full text" to make it easier to view the contents of the task section.

If you are happy with the starter tasks, you can begin to create your own tasks and subtasks by clicking "Add a new task or subtask". The system will automatically number the task with the next number in the sequence (6.1.3), however, you may change this number if you'd like. The system will accommodate five levels of indenture (e.g. 6.X.X.X.X.). To create your task/subtask, simply fill in the text fields provided. First change the task number if you'd like, then type in a heading for the task/subtask in the "New Task Title" text box, and then describe the required task/subtask in the "Task Description" text box. Click "Save" to enter your task. Again, you may cut and paste text from a Word document if you'd like. When you're finished adding all the tasks/subtask for your SOW, click "Save and Next".


Statement of Work - Tasks and Subtasks - Netscape
Specific Tasks and Subtasks
Use the links below to view, edit, or delete your tasks and subtasks. You may see this page in outline or full text mode.
Add a new task or subtask
Task Number
Task Title
View
Edit
Delete
6.1
Task 1 - Contract Level and TO Management
6.1.1
Subtask 1 - Integration Management Control Planning
6.1.2
Subtask 2 - TO Management.
Save and Close
Save and Next
You can find out more about DISA contract vehicles at the DISA Technical Service Contracts at the DISA home page...
Document: Done


Statement of Work - Tasks and Subtasks - Netscape
Specific Tasks and Subtasks
Task 1 for each SOW must be for TO Management and must contain the following two subtasks:
Subtask 1 - Integration Management Control Planning
Subtask 2 - TO Management.
Add starter task and subtasks
Task Number
Task Title
View
Edit
Delete
Save and Close
Save and Next
You can find out more about DISA contract vehicles at the DISA Technical Service Contracts at the DISA home page...
Document: Done

Section 7: Place of Performance. There are three choices available for describing the place of performance of your task. They are either "Government Site", "Contractor Site", or "Both Government and Contractor Sites". Click on the radio button that corresponds with your choice. Below the radio buttons, type in the actual site locations, and other clarifying information, in the text box provided.

Section 8: Period of Performance. There are also three different ways to specify the period of performance for your task. You can choose from between the following options:

1. Calendar days after Task Order Award,
2. Calendar days after an event, or
3. Date of award through a specific date.

After you click on the radio button associated with your choice, enter the number of days or the actual date (whichever is appropriate for your choice) in the text box on the screen.

Section 9: Deliverables. In order to complete the deliverables section of the SOW, you must first complete Section 6 (Specific Tasks). Each deliverable must be associated with a specific task or subtask, therefore, if you haven't identified any tasks, the tool will require you to enter some information in Section 6. If you have identified your tasks already, then you can click on the link that says 'Add a new deliverable'. You may choose to view the deliverable section in either an outline view or a full-text view by clicking on the appropriate link in the deliverable section. You can add deliverables in either view.

Once you have clicked on 'Add a new deliverable', you are now in edit mode and begin entering all the information that pertains to your deliverable (Title, Associated Task, CDRL/DID, delivery requirements, copies, and distribution). Each of the fields in the template you fill out correspond to the same information that would have been specified in a DD1423 (CDRL Form) in the past. After you enter the title of your deliverable, go to the next field and choose the corresponding task/subtask from the drop down menu. The next field asks for the CDRL number. If you do not know the CDRL number, you can click on the link labeled 'CDRL' and the complete list of CDRLs for the contract which you previously specified can be viewed as a *.pdf file. You can cut and paste any of the information from this *.pdf file into your form by using the following steps. First click on the 'Text Select' icon on the tool bar (it looks like a capital 'T' with a small dotted box beside it). Then go to the text that you want to copy and highlight it. Once you've highlighted the text, right-click your mouse button while on the highlighted text and select 'copy' from the menu presented. Then simply toggle back to your deliverable template form and right-click your mouse again in the space which you'd like to paste the text, and select 'paste' from the menu presented.

Next, specify when the deliverable is due. There are three options for the due date. Select the option which best suits the delivery requirements for your deliverable. If the deliverable which you are requesting is periodic in nature, that is, if the document is submitted more than once during the period of performance of the task, specify that in the block marked 'Deliverable Frequency and Remarks'.

Complete the remainder of the deliverable information by typing in the number of copies required for this deliverable and who they are to be distributed to. Once you have completed all the information on the deliverable screen, press the 'SAVE' button to enter the deliverable into the system. If you need to add another deliverable, repeat all the above steps again for the new deliverable.

Section 10: Security. In this section, you need to specify the level of security required by the contractor to complete the tasks in the Statement of Work. Do this by clicking on the radio button that corresponds to the correct security level (Unclassified, Confidential, Secret, or Top Secret). If the contract-wide Contract Security Classification Specification, DD254 is not adequate for the specific work in your Requirements Package, then this a paragraph must be added in the text box which includes the security level (as stated above) plus the statement 'Also see attached DD-254'. The TM must provide a specific DD 254 to include any security restraints or releasability constraints that will have an effect on performance of the tasks defined in the SOW. Please note, processing the DD 254 for unique security requirements may extend the time line to award the TO.

Section 11: Government Furnished Equipment (GFE)/ Government Furnished Information (GFI). Simply list any GFE (hardware, material, and facilities) and/or GFI, that will be provided to the contractor in the text block provided. For GFE, provide availability, schedule of use, serial numbers and all identifying information (see FAR Part 45). The list must also identify the IT as Y2K compliant, non-compliant or not applicable (FAR 39.106(b)). *Note: If GFE is a sizable list, indicate "200 Pentium II PCs", for example, and state that serial numbers will be provided at TO award, along with location and delivery method.*

For GFI, list by document number and title, date, etc. Include standards, specifications, and other reference material required to perform the TO. Include any facilities the Government may need to provide to contractor personnel for project performance. You may choose to make a reference to the appropriate GFE/GFI paragraph in the basic contract to ensure the contractor reads it again. Usually, this paragraph is found in Section H of the basic contract.

For Facilities, be specific as to what the facility is, the utilities that will be provided, whether it is furnished "as is", location, whether security clearance will be required, and whether the facilities are sufficient to meet the requirements of the TO.

12. Packaging, Packing, and Shipping Instructions: At a minimum, your SOW must state **"See paragraph X of the (applicable, e.g. JSE, or DII IC, etc.) Contract."** You'll need to verify which paragraph number applies for the contract that you are using. You can get this information from the Task Order Guidelines for that contract. State special requirements only if they exceed the contract requirement.

13. Inspection and Acceptance Criteria: At a minimum, the SOW must state **"See paragraph X of the (applicable, e.g. JSE, or DII IC, etc.) Contract."** Again, you'll need to verify which paragraph in which section applies for the contract that you are using. You can get this information from the Task Order Guidelines for that contract. State special requirements only if they exceed the contract requirement. For example, in the event the product delivered as a result of this task order requires C4I interoperability, inspection and acceptance criteria shall include that the requiring activity will obtain appropriate Government certification/accreditation (Joint Interoperability Test Command, etc.).

14. Other Pertinent Information or Special Considerations: Include any special considerations or unique requirements necessary to accomplish the TO (e.g., "specialized experience with UNIX") and/or any additional information that will be helpful in determining reasonable approaches and cost estimates for the TO. If using the JSE contract, this section might contain:

a. Identification of Y2K requirements. At a minimum, state "**See paragraph 3.3.8 of the JSE Contract SOW**" (as an example). In addition, state any special Y2K requirements which may apply to the requirement.

b. Identification of possible follow-on work that may result from the completion of this TO, that may be added at a later date as a modification to this TO, or that may be helpful to the contractor in determining the best approach for the TO.

c. Identification of specific expertise, educational and work experience required.

d. Identification of Non-Disclosure Requirements. The JSE contractor must execute nondisclosure agreements when working with sensitive and/or proprietary information. Your SOW must identify any sensitive or proprietary information to which the JSE contractor will have access during TO execution so the nondisclosure agreements can be signed by the time the TO is awarded. (Paragraph H-13 of the contract applies.)

e. Government Estimates:

1 - Level of effort (total number of hours) required for the overall effort
2 - Listing of materials/equipment/training (not including travel) required by the contractor for performance of the task.

The SOW is now complete! Press the "Save and Next" button and you'll be given the option of viewing the formatted SOW on your screen or printing your SOW in a PDF format. Simply click on the appropriate link. If you've chosen to generate the PDF version of the SOW, you can either print the document for manual routing or you can save the file to a directory of your choice and/or attach it to an email to forward to others for review.

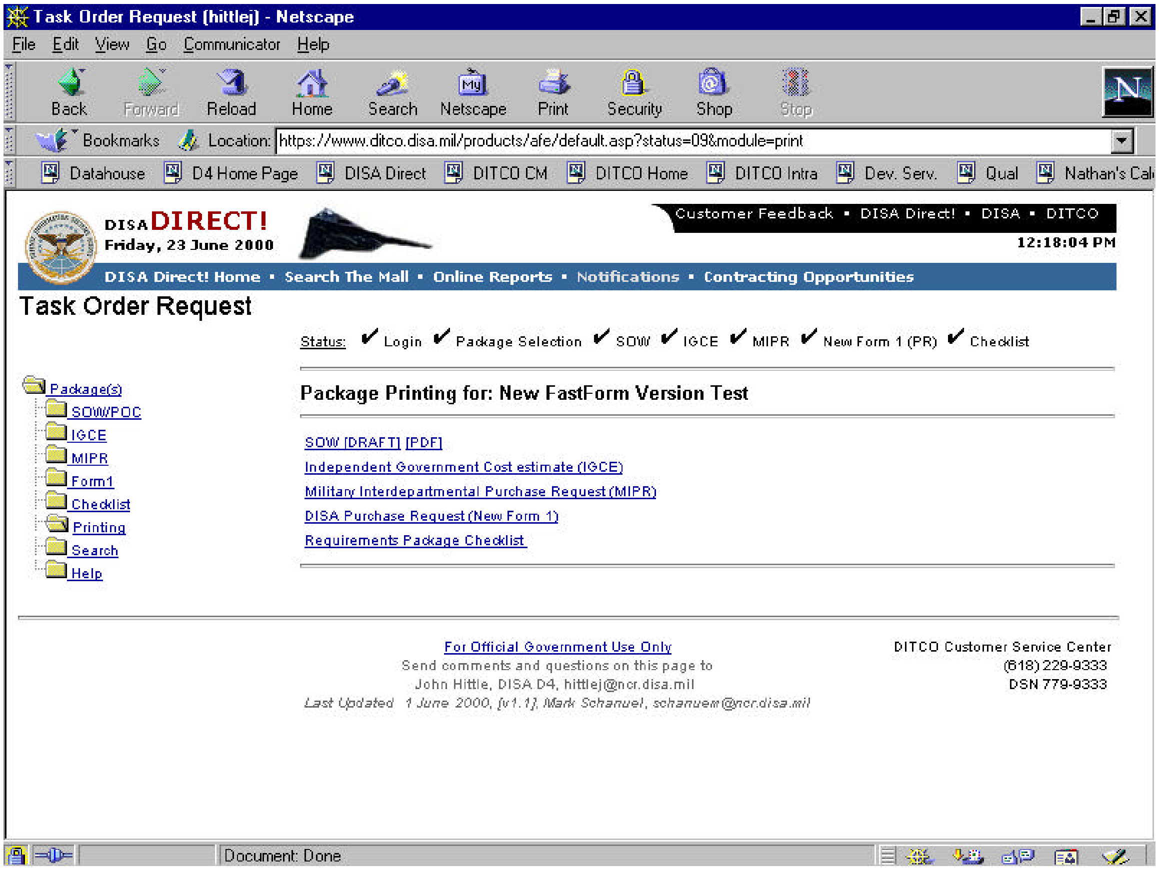
The Rest of the Requirements Package

You've now completed the hardest part of the requirements package. The remaining documents, such as the IGCE, the funding document, etc. are simply form fill documents. As you open each, some of the data will have been automatically loaded in from previous submissions you've made. For example, having typed in the title of your SOW, that title will appear in all the forms which require the title already. You just need to complete the rest of the form templates with the information that pertains to your requirement.

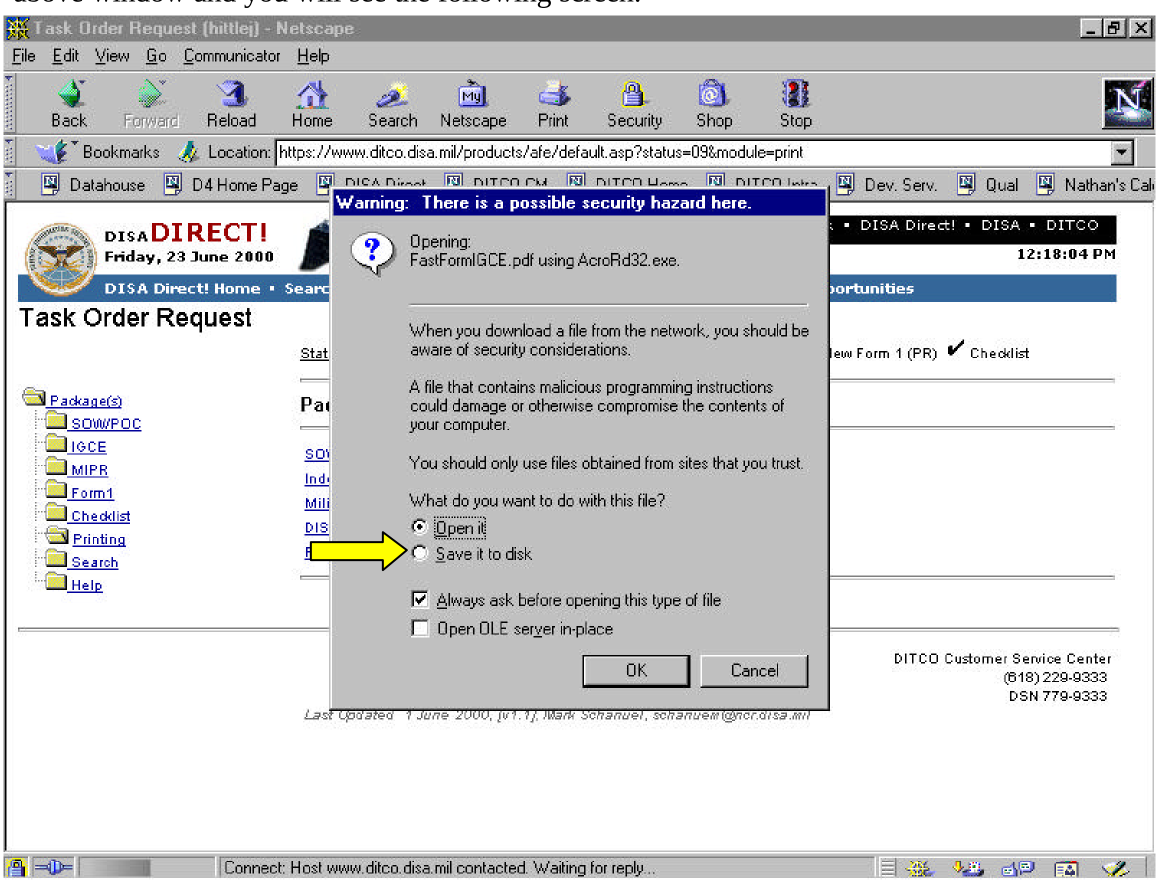
Attaching Completed Documents to an Email

When using APEX, it is not necessary to save the documents you've created to a folder on your machine, because all information is stored on the APEX servers. However, until an electronic routing capability is developed for the APEX system, users will want to attach the documents they've created to an email in order to transmit them to the Contracting Officer, or anyone else in your chain of command. You can do this by following these steps:

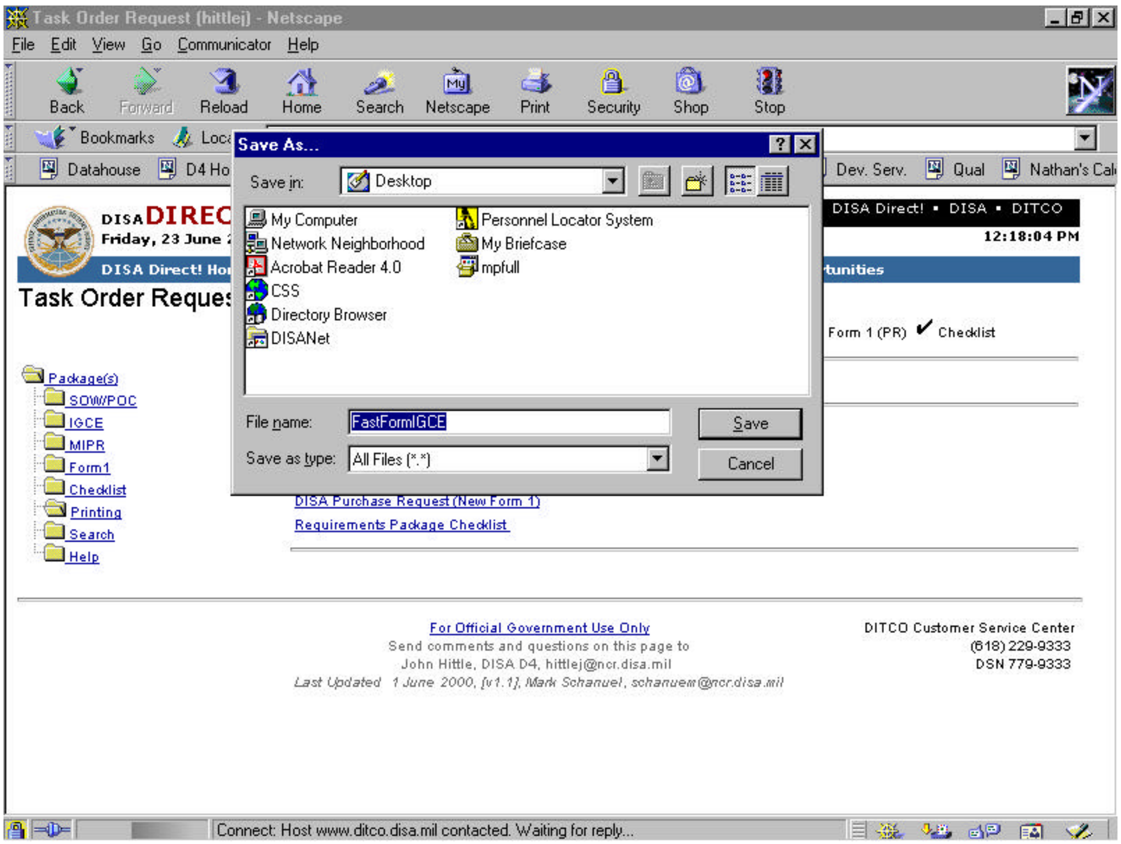
In APEX users have the opportunity to create a PDF version of their document from either the template screen for each document or by clicking on the link labeled "Printing" in the left menu bar. Clicking on this link will bring up a list of all the documents you have created in your requirements package. You should see a screen that looks like this:



The first step is saving each of the documents to a folder on your computer. To do this just click on each of the documents you'd like to attach to your email (for the SOW, click on "PDF", not "DRAFT"). For example, to save the IGCE to your computer, click on the IGCE link in the above window and you will see the following screen:



Now just click the radio button that says "Save it to disk" as annotated by the arrow above. When the next screen appears (see below as an example), simply name the file/s and save them to the location of your preference on your machine.



Now that the documents are on your computer you can retrieve them and attach them to an email just like you would any other file.